

## **ENHANCING INTER-LIBRARY LOANS IN AN OPEN DISTANCE LEARNING INSTITUTION: THE UNISA EXPERIENCE**

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### **ABSTRACT**

#### **1. INTRODUCTION**

The University of South Africa (Unisa) is the African continent's largest Open Distance Learning (ODL) institution, and it is one of the ten mega universities in the world. This paper discusses how the Library has aligned its Interlibrary Loan service with the ODL definition of learning for remote clients in order to enhance and adapt the service to this unique operational environment. In particular, the Unisa Library responds to the challenge of the University's ODL focus areas pertaining to: excellence in research support, student-centredness, overcoming distance and time, multi-modal learning, and training and development programmes. Within the newly designed Unisa Library model, an InfoHub was established with a view to providing equitable services to remote clients who cannot visit a Unisa Branch Library. The Request service of the InfoHub is a driver towards a change strategy for the Interlibrary Loan service, together with other drivers of change such as developments within South Africa's Interlibrary loan infrastructure, the needs of clients in contemporary society, the role of mobile phones in the provision of information and services, and the fostering of international partnerships within the global information environment.

#### **2. FACTORS THAT INFLUENCED CHANGE STRATEGIES FOR THE ENHANCEMENT OF INTER-LIBRARY LOAN SERVICES FOR THE UNISA LIBRARY**

##### **2.1. Open Distance Learning**

The University of South Africa (Unisa) transformed itself from a Distance Education University to an Open Distance University during the past few years. It became the only South African comprehensive ODL institution in 2004, after the Merger of Higher Education Institutions in South Africa. This University has approximately 280 000 students (Unisa 2010:1) and is not only the largest Open Distance Learning (ODL) institution in South Africa, but also in Africa. In addition, it is also acknowledged as one of the ten mega universities in the world. The student body is diverse in terms of enrolled courses, age, race, and abilities (Unisa 2010). The *2015 Strategic Plan* of the University dedicates itself to becoming *the African university in service of humanity* (Unisa 2009:2). Central to achieving this mission lays the conceptualization of distance education and open learning (Unisa 2008:1).

**Distance education** is a set of methods or processes for teaching a diverse range of students located at different places and physically separated from the learning institution, their tutors/teachers as well as other students (Unisa 2008:1).

**Open distance learning** is a multi-dimensional concept aimed at bridging the time, geographical, economic, social, and educational and communication distance between student and institution, students and academics, student and courseware and student and peers. Open distance learning focuses on removing barriers to access learning, flexibility of learning provision, student centredness, supporting students and constructing learning programmes with the expectation that students can succeed (Unisa 2008:2).

Unisa thus combines the characteristics of distance education (a method of education provision) and the approach of open learning into Open distance learning (Unisa 2008:2). The Unisa Library's response to removing barriers to open distance learning, is encapsulated in two focus areas as follows:

#### **2.1.1. Library ODL focus area 1 (Unisa Library 2009a:8)**

- In support of the ODL learning opportunity, the Unisa Library provides access to learning resources and markets its services in order to foster an awareness of this support within the University.
- In support of excellence in research and flexible services, the Unisa Library provides relevant information resources (including web-based research services and information resources); Personal librarian services and the Unisa Institutional Repository;
- In support of student centredness, the Unisa Library's provision of services and information is appropriate to the needs of the learners in Africa.

#### **2.1.2. Library ODL focus area 2 (Unisa Library 2009a:9)**

- Library Web services and Mobile phone services, as well as access to information resources during office hours and extended library hours and services at contact libraries and mobile libraries.
- The Unisa Library provides electronic request and delivery channels and service delivery via Web 2.0 in support of multi-modal learning.

- In support of self-directed learning, the Unisa Library provides training programmes to create lifelong learners.

The Library's Inter-library loan service change strategy is derived from these Library ODL focus areas. This emphasises a shift towards a virtual environment that

- facilitates requests for material not available in the own collection, to be requested at the time when required and from any location where the person is situated;
- makes provision for self-help online Inter-library loan services in addition to mediated requests;
- allows clients to navigate for knowledge in the global village in accordance with their needs and preferences;
- provides training and marketing programmes for clients including lifelong learners to support Inter-library loans in general, including self-help services.

## **2.2. The Unisa Library Infrastructure in support of Open Distance Learning**

In recent years, the Unisa Library adopted a vision to be the leading ODL Library in Africa (Unisa Library 2009b:1). In support of ODL, the Library established several Branch Libraries at Unisa Regional Offices in Africa. It reaches its clients through these contact centres, complimented by additional mobile busses to reach students in the rural areas, but importantly through the Internet. Library access is gained via the Library's web page or the myUnisa portal of the University from where the Library OPAC, databases and services can be accessed. Although the Library had a Request service almost since the establishment of the University many years ago, various functional units in the Library provided a fragmented service, including a separate Inter-library loan service.

Crucial to Open and Distance Learning library services is an efficient request service that responds to remote learner needs for information searches (literature lists); information resources such as books, journal articles and audio-visual materials; electronic information, and further complimented by alerting services (Unisa Library 209a:4). The Unisa Library's new model implemented in 2008, based on business process re-engineering, includes a centralised InfoHub as part of the Library's Information Resources Distribution Directorate. The purpose of this unit is to provide equitable services to remote clients who cannot visit the Unisa Branch libraries. A significant benefit derived from this model is the fact that a holistic approach (of which the Inter-library loan service forms a part) is followed in terms of requests for information and the relevant resources. Requests for information search services and for information resources are processed by a dedicated team, consisting of approximately 100 multi-skilled staff members. This includes a team of professional staff who attend to requests for Information searches. Literature lists are complimented

by the delivery of the relevant information resources by a team of Request processors, retrievers and delivery officers who provide information resources, including inter-library loans on request. An on-line request mechanism for information search services, Unisa library material and for material not available in the own collection is available so that a request for an Interlibrary loan can be placed directly by the client. Delivery is in accordance with the clients preference for delivery by courier, the South African postal service or electronic delivery. Performance objectives and standards are in accordance with client expectations.

The Library's Inter-library loan service change strategy is derived from the new Library structure which has a holistic approach to request services, contributes to equitable service delivery to clients and provides an efficient, seamless request process in order to enhance the Inter-library loan service. The professional team of Information Search librarians adds value to the process as the team can recommend alternative information contained in material available on the Library's databases before requests are placed at international libraries.

### **2.3. South African Inter-Library Loan network**

In South Africa, Sabinet was established in the early 1980's. This company has for many years incorporated and made available location tools such as the joint catalogues for monographs, theses, serials and journals. Its infrastructure is well developed for the sharing of bibliographic data and commercial information services. South African Interlending traffic is channelled mainly through the Sabinet module, ReQuest (Raubenheimer: 1998:73). In 2009, a total of 93 918 items were requested by South African libraries through Sabinet from other libraries in South Africa. Of these requests, a total of 2047 items (books and articles) were requested nationally by the Unisa library, a Nett-Lender within the South African Inter-Library loan environment. (Sabinet 2010:1). Inter-Library loan services at Unisa are mainly for research students and teaching staff of the University.

Sabinet (2009:1-29) services evolved over the years. The company developed its traditional products and services from access to the South African Catalogue to services which also included not only the South African Catalogue, but also ISAP and South African electronic publications. This service was complimented firstly by ReQuest for online interlending requests in South Africa and later by the OCLC FirstSearch service which was added to facilitate access to information via the WorldCat Resource Sharing mechanism for international interlending. Additional databases and alternative platforms were added to the service. Today, as a result of the Sabinet OCLC partnership, Interlibrary-loan services can be customised by Sabinet in accordance with a Library's particular needs.

In 2009, the Sabinet service evolved further as it provided access to information with the introduction of WorldCat Local. This service facilitates access to an

institution's own OPAC as an entry point via OCLC WorldCat.org. It enhances Inter-library loan services as searching previously done on four respective interphases is no longer required. WorldCatLocal offers one simple search box to provide access to information. All Worldcat.org functionality is available on WorldCat Local. This includes:

- Library-branded version of WorldCat.org
- Serving as a library discovery and delivery service
- Interoperating with the Unisa Library existing library systems
- Links to ReQuest and WorldCat Resource Sharing

WorldCat Local thus offers a single discovery solution. It immediately retrieves the item in the local catalogue, checks the availability of the item, places a hold for the item directly on the local catalogue if permitted or places the request directly on the local catalogue. If not available in the own local catalogue, the user can locate the item held by Sabinet libraries and request it via the Sabinet ReQuest system. The ReQuest functions available via the Get It –option now encapsulate these steps in one. If not available from one of the Sabinet libraries, an item can be located via Worldcat and requested via the international resource sharing function.

The Library's Inter-library loan service change strategy derived from these factors, indicates a need for a shift from mediated Inter-library loan services to an unmediated self-help Inter-library loan service to be facilitated by the Unisa library for its authorised users. This should speed up document delivery to prevent information being received when it is no longer useful and facilitate a discovery and delivery experience for the researcher.

#### **2.4. Challenges of user demands in the 21 st Century**

In this regard, Unagha (2009:196-197) alludes to the fact that the Nigerian university library in Africa needs to turn itself into a magnetic force around which teaching, learning and research resolves. User service demands should be met by maintaining quality products and services. Libraries must therefore provide viable and responsive library services in order to keep their clients in a 21 st Century competitive environment. These challenges also apply to the Unisa Library. The 21<sup>st</sup> Century Unisa students live and work in the Knowledge age. They require that the Library comes to them from where they can explore independently and evaluate and compare what they discover and then assess the significance of the information in terms of its relevance, importance, validity and reliability (Unisa Library 2009a: 2).

The Library's Inter-library loan service change strategy derived from these factors, indicates a need for the Library to make Interlending services available where ever the client is by integrating Inter-library loan services in a seamless

process including making available unmediated services for all requests nationally and internationally. Services should be marketed and relevant training be provided continuously. The Unisa Library's InfoHub aims to fully integrate the Request services into the University's myUnisa Learning Portal of which the Library forms part (Unisa Library 2009a:10). Its planning is currently towards the ideal Internet platform, i.e. a virtual learning space in which the information resources and services of the Unisa Library are fully integrated with an electronic teaching and learning programme.

## **2.5. Mobile access to information**

The number of mobile phone subscribers in the world hit 2.3 billion in 2006, and is expected to increase to 3.3 billion by 2011 on a compound average growth rate (CAGR) of 7.2%, according to Taiwan's Market Intelligence Center (MIC 2006:1). In 2009, Liebenberg (2009:1), Regional Director for Sub-Saharan Africa at Research In Motion (RIM), the company behind the BlackBerry® solution, stated that rapid penetration of cellular phones into South Africa and the rest of the Africa will set the stage for mass adoption of the Internet across the country and continent. He refers to a study from Ernst & Young that found that market penetration of cellphones in Africa is sitting at 37% and noted that the continent has largely bypassed fixed-line telecommunications solutions in favour of mobile technology. South Africa has cellular penetration of about 98%. Unisa library statistics indicate that 90% of all students have mobile phones (Unisa Library 2010:2).

The Unisa Library implemented a mobile Library service through the use of Airpac as students prefer to explore independently, evaluate and compare what they discover and assess its significance. This service puts the Library catalogue in your hand. The service requires a Library Internet address (URL); a Wireless Application Protocol (WAP) which is an advanced messaging service on mobile phones and other small screen devices that allows you to see internet content in special text format; enabled mobile phone or other 3G (third generation telestandards and technology for mobile networking) mobile devices, an Internet browser over TCP/IP, (communications protocols used for the Internet and other similar networks, eg. Opera Mini), usually provided by your cell phone provider. The service is possible in any area that has cell phone coverage. The patron loan records can be checked from this mobile service to view items checked out on loan record, or on hold; and a request for an information search, information resource can be placed (Unisa Library 2009:2-20).

The Library's Inter-library loan service change strategy derived from these factors indicates a need for mobile phone information search services and request services, including mobile phone self-help Inter-library loan services. With the availability of WorldCat on the mobile phones to be implemented soon, clients will be able to request material on Inter-library loans from any place in the world if necessary.

## **2.6. Unisa Library partnerships**

The Unisa Library has for many years fostered partnership agreements with libraries in order to enhance its Inter-library loan service. As a member of the Gauteng and Environs Library Consortium (GAELIC), it benefits from academic library resource sharing agreements nationally. In addition, the Library has agreements with other consortia or member libraries of consortia in South Africa in order to enhance resource sharing locally through improved delivery of requested Inter-Library loan material.

Statistics indicated that of the 1383 journal articles requested for researchers in 2008 by the Unisa Library from overseas suppliers, only 767 (55%) was filled. However, of these requests, 287 requests were cancelled as inadequate information was provided, most probably due to wrong information captured by library staff from the original requests. The turnaround time for international requests was 95% filled in 21 days. This met the Library's objective of 80 % to be filled in 21 days (Unisa Library 2008:2). It was decided to deploy staff to focus on national requests while outsourcing requests not available locally to an outside information partner. This interim solution was proposed so that local reciprocal arrangements could be executed rapidly until full capacity was reached in the Library. As global interlending is quite laborious, it needed to be established whether the Library could benefit from an information partnership, particularly during periods of staff shortages or during peak periods.

To this end, the Unisa Library fostered a partnership with an international partner, i.e. Australia's Infotrieve. This company was considered and ultimately selected as a partner in terms of its past 20 years experience, its growth from a leader in document delivery services in the United States into a global full-service information management company, and because it was a service provider to leading organisations around the world, including more than half of the Fortune 500. Statistics kept during a period of one year, i.e. the period May 2009 –April 2010, indicate an average fill rate of 45% of requests submitted within one day; 84% within 5 days; 85% within 14 days. The time difference remained a barrier which sometimes impacted on the measured turn- around time.

The Inter-Library loan change strategy is derived from the benefits that external partners can bring to enhance Inter-library loan services. Unisa Library staff time could be freed up to attend to other tasks such as the filling of national requests, as Infotrieve was able to procure works in all subject areas, from all geographic areas and all time periods as well as a wide variety of published works. There was no searching required by Unisa Library staff. The request received from the Library client, or even only a citation, could simply be forwarded to Infotrieve. The fill rate obtained by the supplier indicated an increase to the 2008 fill rate obtained by the Library.

## 2. CONCLUSION

The Unisa Library manages its Inter-library loan service in terms of the six drivers for a change strategy to enhance Inter-library loans so that this service can be relevant to the open learning environment in which it operates. A shift towards a service that meets the challenges pertaining to Unisa Library client demands in the 21<sup>st</sup> Century is noted. This, together with the full utilisation of services provided by Sabinet, benefits flowing from the Unisa Library's new Library model, the utilisation of mobile phones for request services as well as information service partnership formation, enables the Unisa Library to meet the Inter-library loan service expectations of its clients in a competitive environment.

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